



Megabus Customer Update

Tips, New Features and Troubleshooting on all the key areas in Marlin® GTX and Marlin HR®

Please find below some useful tips for your business. The team at Megabus is here to help you. Please contact me on the number above if you have any concerns or need assistance with your business systems. We will be sending out regular updates so you can make informed decisions on the key areas in your business.



Customer Maintenance [Part two]

Please find below some of the functions available in Customer Maintenance:

1. **Customer Search** – Quick search for a customer by their invoice number
2. **Normal Sell price** – Make sure your customers are set up to default to the correct sell price
3. **Bill To feature** – You can combine several accounts to have one central statement
4. **Audit Log** – Review any maintenance changes to your customer files
5. **Single Touch payroll** – Phase #2

1. Customer search

Did you know that you can search by invoice number rather than trying to find the transaction under the customer code?

Select **Main | Customers | Manage Customers** | and then click on the binocular's icon.



You can then search by a transaction type e.g., Invoice and then type in the reference number.

Search for a Transaction

Transaction Type:

Reference Type:

Our Reference:

Date	Branch	Our Reference	Their Reference	Transaction Type	Amount	Balance	Age
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2. Normal Sell Price

Did you know you can set up each of your customer accounts to default to a sell price (E.g., Retail, Wholesale/Trade etc.)?

- This can be setup in **Main | Customers | Manage Customers**
- Select the customer account and click on **Options**
- Choose the Normal sale price from the drop-down list.
- This will be the default price when you are doing a customer work order/invoice.

View Customer MEGCUS (MEGABUS CUSTOMER ACCOUNT)

Details Options Contacts (0) Documents Transactions Payments Due (5) Contract Statistics Notes Attachments (0) Audit Log Maintainers

General

Salesperson:

Sales Analysis Code: CASH SALE

Account Type:

Alternate Account Code:

Bill To:

Payment Type:

COD Payment Preference:

Payment Terms:

GST Exemption Number:

Pricing

Sell Including GST:

Merchant Fee Account:

A Merchant Fee account should only be used for customer A/C's where a commission/fee is deducted from the total sale value. Normal customer accounts should leave this field blank.

Discount Granted Account:

Discount Code: 10% off RRP

Specials Category:

Normal Sell Price:

Use Their Prices On Elec P/O:

Allow Promotions:

Allow Special Prices:

Allow Add-On Packages:

Banking

Cheque Drawer:

Bank:

Branch:

Our Bank Account:

3. Bill To feature

You may have a customer account that has a few separate locations but requires one central statement.

Did you know that you can add each of the locations and then join these to the Head Office account?

You only need to do one payment against the consolidated invoices.

Please let us know if you need any assistance with setting up this feature.

The screenshot shows a form with three input fields. The first field is labeled 'Account Type *' and has a dropdown menu with 'Retail' selected. The second field is labeled 'Alternate Account Code' and is empty. The third field is labeled 'Bill To' and is also empty. A red arrow points from the 'Bill To' label to its corresponding input field.

4. Audit Log

Marlin GTX™ records all maintenance changes.

You can find out the time, date, who changed the record and machine (user) with each field that has been changed.

In Manage Customer please click on the Audit Log tab to see any changes to your data.

The screenshot shows a horizontal navigation bar with several tabs. The tabs are: Details, Options, Contacts (0), Documents, Transactions, Payments Due, Pending Rebates, Statistics, Notes, Attachments (0), Audit Log, and Maintainers. The 'Audit Log' tab is highlighted with a red border.

Audit Log				
Date	Time	User	Changed By	Description

Update	Weekly Topics
#1	Payment Details and Integrated Eftpos
#2	Monitoring outstanding customer accounts
#3	Using work orders
#4	Business Planner Tips
#5	Customers – Part 1